

Plan Faster, Without Giving Up Control

CoPlanner helps you build high-quality financial plans faster by analyzing your client's facts and evaluating planning actions to generate multiple approaches for you to review, refine, and save to create a plan. You stay in control at every step.



Our research and beta use show that with CoPlanner you can:

- Save up to 48% of your time when building financial plans
- Deliver plans that 78% of surveyed planners said closely match what they would create
- Reduce goal sacrifices by 5-10% while still achieving the target probability of success

How it works

CoPlanner uses a proprietary, logic-based framework built by eMoney's product and financial planning experts to help build plans using consistent, real-world planning logic. It keeps you in the driver's seat with full control over the actions considered, the target Monte Carlo probability of success, and the ability to modify or dismiss any change before it's applied to the plan.



Build Plans Faster

Generate multiple system-generated planning approaches in seconds.



Increase Efficiency

Apply consistent planning logic across all your clients while personalizing every recommendation.



Serve More Clients with Confidence

Spend less time building plans and more time having meaningful conversations with your clients.



Stay in Control

You control the target probability of success and the techniques evaluated, and review every option before it's applied to the plan.